



SOAR

SOAR

SSI/SSDI Outreach, Access, and Recovery

State of Washington

Importance of SSI and SSDI for People with Disabilities

SSI and SSDI are the last entitlements and are critical benefits for ending homelessness and promoting recovery for people with disabilities...

These benefits help in obtaining treatment, services, housing and...
employment

The Problem

- ❑ Only about 10-15 percent of homeless adults are approved on initial application
- ❑ Only about 29 percent of **all** applicants are approved on initial application
- ❑ Appeals take years and many people give up and do not appeal

What We Know Is Possible...

Approval rates of 65-95%
on initial application,
in less than 4 months.



Uses SAMHSA's *Stepping Stones to Recovery* Training Curriculum

- Based on success of University of Maryland Medical Center SSI Outreach Project in Baltimore
- Achieved 96% approval rate for those assessed to be likely eligible
- Engagement, relationship, and assessment are integral parts of project and curriculum
- Community wide efforts work best



Approval Rates Are Highest...

- ✓ In places where more SOAR critical components are implemented
- ✓ In Washington, where the DVA has a 95% approval rate in an average of 96 days

How Is This Model Different?

- ✓ Case managers actively assist applicants and develop evidence
- ✓ Emphasizes success on the initial application
- ✓ Avoids appeals and consultative exams whenever possible
- ✓ Focuses on documenting the disability

Programs that assist with SSI/SSDI need partners:

- ✓ to facilitate access to medical records,
- ✓ to provide needed health assessments,
- ✓ for ongoing training and mentoring,
- ✓ and for resources for program sustainability.
- ✓ Community wide efforts work best

Critical Components for Success

1. Staff trained & committed to assist with applications
2. Maintain contact with applicant
3. Become applicant's representative
4. Obtain medical records, past and present
5. Collaborate with physicians.
6. Collaborate with DDS and SSA.
7. Ensure Quality of applications.
8. Arrange for Representative Payees

1. Staff trained and committed to assist with applications

- Agencies assisting with SSI applications, especially with people who are homeless, must have outreach capacity
- Staff must have time to work on all aspects of application process to be successful
- Designated staff is often helpful in developing expertise
- Sustainability must be considered

2. Maintain contact with the applicant

- Technical denials by SSA are largely due to an applicant's inability to follow up
- Staff can use technology to stay in touch with SSA, e.g., e-mail
- Staff who assist must be skilled in engagement, maintaining contact, and assisting in beginning recovery

3. Become applicant's representative using SSA-1696

- Becoming a representative allows the case manager to:
 - Receive all correspondence from SSA/DDS
 - Receive complete record on CD in case an appeal is needed
 - Respond to questions from SSA and DDS without applicant's presence
- Poses no special liability to case manager or agency

4. Obtain applicant's medical records, past and present

- ✓ Complete medical information is critical to the disability determination process
- ✓ Active role for case managers expedites this process
- ✓ Procedures with providers need to be developed **before** SSI effort is implemented
- ✓ Case manager submits medical summary report co-signed by applicant's physician/psychologist

5. Collaborate with physicians to do assessments & provide medical information

- Obtain needed assessments ***prior to*** submission of complete package of medical information
- Need mental status exam within past 90 days
- Prepare for diagnostic evaluations by using program staff to conduct thorough clinical assessments
- Avoid Consultative Exams (CEs)

6. Collaborate with SSA and DDS

- ✦ Establish collaborations with Social Security Administration (SSA) offices
- ✦ Work whenever possible to have designated SSA staff liaisons for SOAR
- ✦ Develop partnership with Disability Determination Services staff
- ✦ Ask for designated DDS staff
- ✦ Flag applications at both SSA and DDS (can be done electronically)

7. Ensure quality of applications prior to submission

- ✓ Provide for a process to review applications for completeness prior to submission to SSA
- ✓ Review at each step in the process
- ✓ Review medical summary reports

8. Arrange for representative payees

- ✓ Providing representative payees must be addressed as part of an SSI initiative
- ✓ Many people need a payee at the time of initial approval
- ✓ Authorized payees can be paid for services up to a set amount from SSA

Making This Happen in Your Community...

- Local community planning
- Collaboration with local Coalition to End Homelessness and other groups,
- Integration of SOAR into all aspects of homeless planning, including County 10 Year Plans to End Homelessness,
- Exploration of creative ways to fund direct staffing,

Conclusion

- ✓ Focusing on expediting benefits works!
- ✓ It's a win-win for the individual and for community programs
- ✓ We invite you to join the effort to implement SOAR in Seattle – monthly meeting at DDS on 4th Tuesday

For More Information on SOAR

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